

Canvassing

An effective canvass is the single most important element of your campaign. Whether you canvass each employee individually or hold a group canvassing session with one on one follow up, it is important that each employee be approached individually and followed up with!

Canvassing should have a definite time frame with a fairly short turnaround (1-2 weeks) and should take place before any special events. Having a strong reporting and monitoring system in place will help you track your progress and allow you time for planning a re-canvass if goals are not met.

The Ask

Types of Asks

Make your own donation first – it is much easier to ask others to give when you have done so yourself! Begin by canvassing people you know; it is a great way to get comfortable with the ask and build your confidence.

Here are approaches for canvassing:

One to One

A canvasser personally connects with a fellow employee. When employees are asked to contribute by a peer, it is more meaningful. Peer canvassing is advisable at every level of the organization and is preferable where employees are spread over a large area and it is difficult to get everyone together.

Group

Pledge forms are distributed following a presentation, an effective and efficient method, ensuring everyone receives the same message. Your canvasser team still has a one-to-one role to play in these situations by encouraging employees to attend all presentations and following up with those who were not present.

Combination

Similar to a group canvass, a presentation is held but pledge forms are not distributed, allowing Canvassers to perform a one-to-one follow-up with each employee. Canvassing should be done immediately following the presentation.

Mail

Pledge forms are distributed by mail. While the personal approach is the most effective method of canvassing, certain work situations (i.e. field workers and retirees) necessitate the use of a mail approach to effectively reach all employees. Experience shows that the most effective mail solicitations are conducted as a separate communication and not included in pay envelopes. Many campaigns incorporate a personal phone call to follow-up on outstanding donations.

Sample Ask

The number one reason people do not give is that they were not asked! Make sure every employee was asked to participate, face to face when possible.

Know your campaign details:

- When is your campaign beginning/ending
- Tell them about the exciting events the internal United Way committee has planned
- Share your campaign goal

Be prepared for questions and concerns

- Familiarize yourself with UWP and our work
- Arm yourself with our FAQ (included in this guidebook)
- If you don't know the answer or are not comfortable answering the question, offer to get back to them and send along the question to your UWP staff support. It's ok not to know!

Make the ask

- Find out their interests and connect them to United Way
- One on one and peer to peer is the best way to ask

Tips for making the ask

- Be positive
A smile can go a long way
- Ask co-workers you know first
Start by approaching the people you're most comfortable with first. You'll gain confidence and be ready to approach those you don't know well after
- Highlight the important of each gift
Talk about the impact of each individual's gift and the difference it makes in the community
- Mention the ease of giving
Encourage giving through payroll. Emphasize how their gift can be spread over specific pay periods. Tell them that their payroll gift is recorded on their T4 so it's easy at tax time.
- Contributing is voluntary

SAMPLE ASK

"I just wanted to come by and drop off this United Way pledge form and some information about some key United Way-supported programs that are happening right here in Peterborough City & County!

Your gifts make a difference right here in our neighbourhood. To help the most people, we are striving for GOAL (amount or participation level).

If you have any questions about United Way please let me know. Thank you for your thoughtful consideration to pledge this year!"

Share your enthusiasm and be a resource to help your co-worker make an informed decision about giving.

Tips for promoting pledge card giving:

- Create 'passport' to all events for those who return pledge form early
- Reserved parking spots
- Lunch in the boardroom with the CEO
- Company promotional items
- Extra break/ shortened work day/ Friday afternoon off
- Free oil change
- Free assistance with personal income tax preparation from your accounting department
- Birthday vacation day
- A travelling trophy that goes to the department with the highest participation
- Dress down days
- Provide certificates for free coffee for a week
- Provide certificates for a free meal if an in-house cafeteria is available
- Spring cleaning or housekeeping service coupon
- A "make your own ice cream sundae" party
- Trade your job with the senior manager of your choice for a day
- Hand out pledge cards at the kick-off and encourage return of the pledge card at the end of the event to be entered into a draw for a prize. A donation must not be required in order to be eligible for the draw
- Encourage all staff members to submit their pledge form even if they are not donating to ensure that the organization can get an accurate sense of their participation rate
- Create visual representation recognizing people who have donated. The visual recognition encouraged other employees to make a donation

* Where the donor received an item, privilege, or other benefit in return for a donation, the value of the benefit may not exceed the lesser of \$75 or 10% of the donation amount. For more information, visit cra-arc.gc.ca.